Taxpayer Name: ____ Email:_______________________________

Spouse Name: ____ Email:_______________________________

Primary Phone Number: _______________________________

Please complete the following 2020 tax year questionnaire, sign and return it to our office.

PERSONAL INFORMATION

YES NO

☐ ☐ 1) Did your marital status change this year?

☐ ☐ 2) Did your address change during this year? If yes, please provide with tax documents.

☐ ☐ 3) Can you be claimed as a dependent by another person?

☐ ☐ 4) Did your bank account change during the year for direct deposit purposes? If yes, please provide a voided check with your tax documents.

☐ ☐ 5) Have you been a victim of identity theft or identity fraud?

☐ ☐ 6) Have you served or are you currently serving in the United States military?

DEPENDENTS (SKIP IF NO DEPENDENTS CAN BE CLAIMED)

YES NO

☐ ☐ 7) Were there any changes in the number of dependents due to birth or adoption? If yes, please provide a social security card and birth certificate with your tax documents.

☐ ☐ 8) Were any of your unmarried children, who might be claimed as dependents, 19 years of age or older at the end of 2020?

☐ ☐ 9) Did you have dependents under age 19, or 24 if a full-time college student, during 2020 who had over $2,200 in unearned income?

☐ ☐ 10) Did you pay for childcare for your child, under age 13, so that you could work?

ESTIMATED TAXES

YES NO

☐ ☐ 11) Did you make any estimated tax payments for 2020? If so, please provide date(s) paid and amount(s). ____

☐ ☐ 12) If you have an overpayment of 2020 taxes, do you want the excess applied to your 2021 estimated tax taxes?

INCOME

YES NO

- ☐ ☐ 13) Did you receive or pay alimony due to a divorce decree issued prior to 2019?
- ☐ ☐ 14) Did you cash any Series EE U.S. savings bonds?
- ☐ ☐ 15) Did you receive any disability income?
- ☐ ☐ 16) Did you receive unemployment income?
- ☐ ☐ 17) Did you receive any economic impact payments “stimulus” for COVID-19 relief? If yes, please provide a copy of IRS notice 1444-A received (letter from the President) or bank statements showing the deposits with your tax documents. Please note this is not taxable income.
- ☐ ☐ 18) Did you have any foreign income or pay any foreign taxes?
- ☐ ☐ 19) Did you have an interest in or other authority over a financial account in a foreign country?

PURCHASES AND SALES

YES NO

- ☐ ☐ 20) Did you purchase rental or royalty property, or acquire an interest in a partnership, S corporation, trust, or REMIC?
- ☐ ☐ 21) Did you sell any stocks, bonds, or other investment property?
- ☐ ☐ 22) Did you purchase, sell, or refinance your principal home or second home, or take out a home equity loan? If so, provide **all** settlement statements.
- ☐ ☐ 23) Did you use any mortgage loan proceeds for purposes other than to buy, build, or substantially improve your home?
- ☐ ☐ 24) Did you make any residential energy-efficient improvements or purchases involving solar, wind, geothermal or fuel cell energy sources?
- ☐ ☐ 25) Did you receive, sell, send, exchange, or otherwise acquire any financial interest in any virtual currency, such as BitCoin?

RETIREMENT PLANS

YES NO

- ☐ ☐ 26) Did you receive a distribution from a retirement plan (401(k), IRA, SEP, SIMPLE, Qualified Plan, etc.)? If yes, please provide form 1099-R
- ☐ ☐ 27) Did you make, or plan to make, a contribution to an IRA?
  Please check the type of IRA. _______________Roth _______________Traditional
- ☐ ☐ 28) Did you transfer or rollover any amount from one retirement plan to another retirement plan?
- ☐ ☐ 29) Did you convert any funds from a tax-deferred retirement account to a Roth IRA?
- ☐ ☐ 30) Did you use funds from an IRA to pay for education or first-time homebuyer expenses?
- ☐ ☐ 31) Did you return any 2020 distributions from your retirement account prior to August 31, 2020?
- ☐ ☐ 32) Did you take a distribution from a retirement account because you, or a member of your household, were physically or financially impacted by COVID-19?

EDUCATION EXPENSES

YES NO

☐ ☐ 33) Did you or your dependent receive a distribution from an Education Savings Account or a Qualified Tuition Program? If so, please provide Form 1099-Q.

☐ ☐ 34) Did you or your dependent incur any tuition or education expenses that were required to attend a college, university, or vocational school? If so, please provide Form 1098-T and an account summary from the educational institution.

☐ ☐ 35) Did you pay student loan interest?

BUSINESS OWNERS – (SKIP SECTION IF NOT SELF-EMPLOYED)

YES NO

☐ ☐ 36) Do you have an office in your home that is used regularly and exclusively for business?

☐ ☐ 37) Did you make any payments to an individual that exceeded $600 in 2020?

☐ ☐ a) If "Yes", did you or will you file required Forms 1099?

☐ ☐ 38) Are you claiming car or truck expenses for business use?

☐ ☐ a) Was your business vehicle available for personal use during off-duty hours?

☐ ☐ b) Do you (or your spouse) have another vehicle available for personal use?

☐ ☐ c) Do you have evidence to support your deduction?

☐ ☐ 39) Do you maintain separate books and records to reflect income and expenses?

☐ ☐ 40) Do you have a business license in the State of Washington?

☐ ☐ 41) Did you receive any funds from the Payroll Protection Program or an SBA Economic Impact Disaster Loan (EIDL)?

RENTAL PROPERTY – (SKIP SECTION IF YOU DO NOT OWN RENTAL PROPERTY)

YES NO

☐ ☐ 42) Did you make payments to an individual that exceeded $600 in 2020?

☐ ☐ a) If "Yes", did you or will you file required Forms 1099?

☐ ☐ 43) Are you claiming car or truck expenses for business use?

☐ ☐ a) Was your business vehicle available for personal use during off-duty hours?

☐ ☐ b) Do you (or your spouse) have another vehicle available for personal use?

☐ ☐ c) Do you have evidence to support your deduction?

☐ ☐ 44) Do you maintain separate books and records to reflect income and expenses?

☐ ☐ 45) Did you make any substantial improvements to your property in 2020?

☐ ☐ 46) Did you perform a total of 250 or more hours of rental management services during 2020 for your rental property?

MISCELLANEOUS

YES NO

- ☐ ☐ 47) Do you have a reason to opt out of e-filing?
- ☐ ☐ 48) Do you and/or your spouse want to allocate $3 to the Presidential Election Campaign Fund?
- ☐ ☐ 49) May the IRS discuss your tax return with your preparer in the event of an IRS notice?
- ☐ ☐ 50) Did you pay a household employee such as a caregiver, nanny, or housekeeper?
- ☐ ☐ 51) Did you pay long-term care expenses to an assisted living facility or home health provider?
- ☐ ☐ 52) Did you have a high deductible health plan and contribute funds to a Health Savings Account?
- ☐ ☐ 53) Did you purchase health insurance from the healthcare marketplace?
- ☐ ☐ 54) Are you and/or your spouse considered legally blind?
- ☐ ☐ 55) Are you involved in a bankruptcy, foreclosure, repossession, or did you have debt forgiven?
- ☐ ☐ 56) Were you granted, or did you exercise, any employee stock options during 2020?
- ☐ ☐ 57) Did you receive any correspondence from the Internal Revenue Service?
- ☐ ☐ 58) Did you or your spouse make any gifts to an individual or trust that total more than $15,000?
- ☐ ☐ 59) Do you want access to your 2020 tax return copy electronically?
- ☐ ☐ 60) Are you an educator that incurred out-of-pocket expenses for supplies, including personal protective equipment, or professional development?

ITEMIZED DEDUCTIONS

For 2020, the standard deduction has been increased to $24,800 for married couples, $18,650 for head of household, and $12,400 for single or married filing separately. If you are 65 and older, an additional deduction of $1,300 per person if married and $1,650 for a single person is allowed. If you feel that itemizing deductions for your medical expenses, mortgage interest, property taxes, sales taxes, and contributions would exceed the standard deduction allowed, please provide the corresponding documents. You may deduct up to $300 in cash donations if you are unable to itemize. Medical expenses must exceed 7.5% of your adjusted gross income before they can be added to your deductions.

Please sign and date below:

____ ____

Taxpayer Date Spouse Date

Throughout the year, Bigelow Family Financial, LLC may occasionally send out emails to our clients with information regarding tax law changes and updates about our firm. Please let us know if you would like to be included in our email updates. Thank you.

I would like to **opt in** to receiving email communications ____________________

I would like to **opt out** of receiving email communications ____________________